Microsoft Dynamics CRM Release Preview Guide

Spring '14

Detailing:

- Microsoft Dynamics CRM 2013 SP1
- Microsoft Dynamics CRM Online Spring '14
- Microsoft Dynamics Marketing
- Microsoft Social Listening
- Parature

NOTE:
The guidance included in this document reflects current release objectives as of April 2014. This document is not intended to be a detailed specification, and individual scenarios or features may be added, amended or deprioritized based on market dynamics and customer demand.
Please contact your salesperson for more information on the pricing and licensing of features contained in this release preview guide.

Microsoft Dynamics

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Introduction

The explosion of the social conversation along with the proliferation of mobile technology has changed our lives, more than we ever could have imagined. It is no surprise then that companies who wish to remain competitive in this new age are concentrating their efforts on creating differentiating customer experiences. In fact, some industry analysts believe that customer experience is the last bastion of competitive differentiation. What is also quite impressive, is that putting customers at the heart of everything you do pays off—it can really impact your bottom line. Studies have shown that not only will customers pay more for better experiences, but that the benefits in increased profitability and revenue are significant.

At Microsoft Dynamics, our vision is to help our customers deliver the kinds of amazing customer experiences that will help their business thrive. To do this, we feel there are three things organizations need to be able to do:
- They need to be able to market smarter – planning and delivering engaging campaigns, then being able to prove the quantifiable results of their efforts.
- They need to be able to sell effectively – enabling their salespeople to focus on what matters so that they can close more deals, faster.
- And they need to provide customer service everywhere – they need to be responsive, delivering relevant information so that in every moment of truth, they can earn customers for life.

This document highlights the capabilities in the Spring '14 release that will further our customers' abilities to deliver amazing customer experiences. With a commitment to an agile release cycle, there are currently several releases in planning and development. The Spring '14 release will be delivered to our online customers as an automatic service update with the option to opt in for additional Customer Service capabilities, and to our on-premises customers as an installable service pack (SP1).

Key Investment Overview

To help our customers market smarter, sell effectively and provide customer service everywhere, we are investing in the following areas:
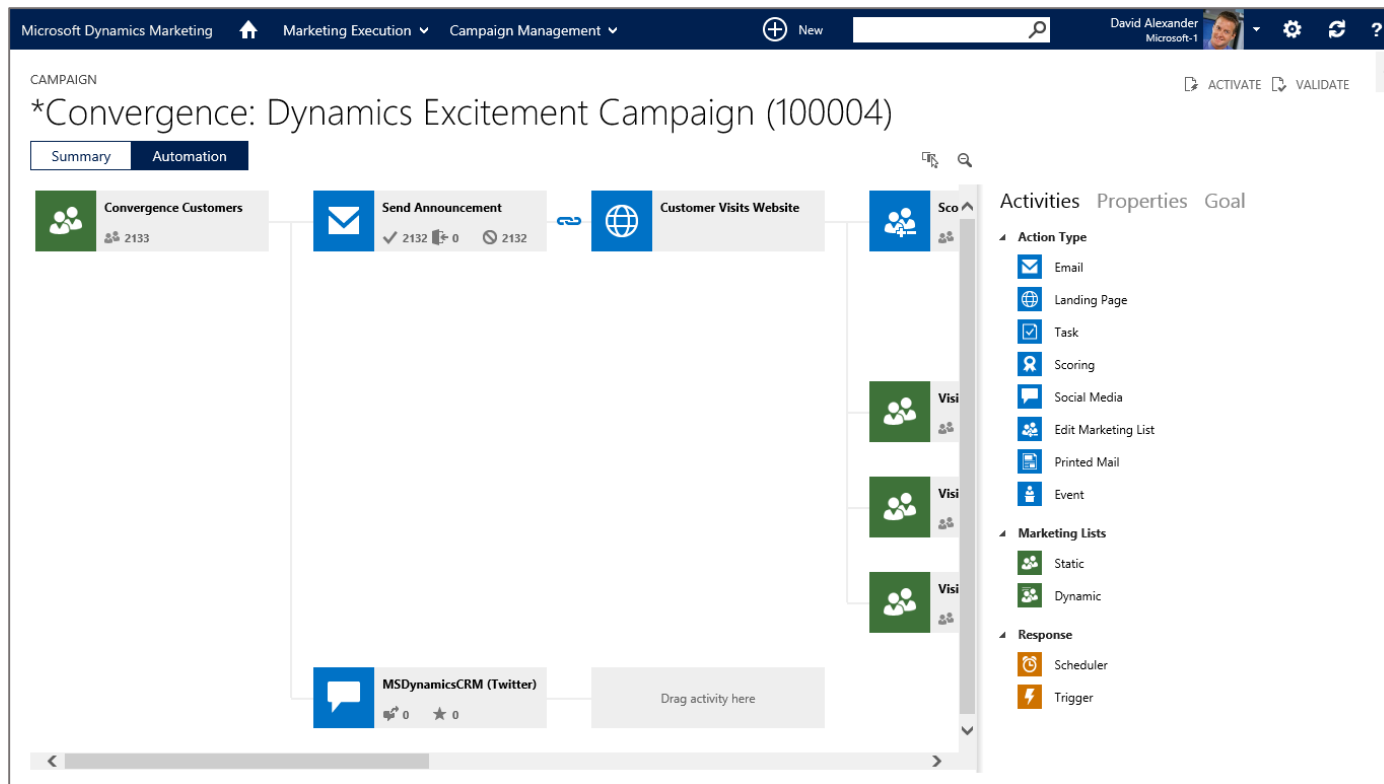
Marketing

In the office of the CMO, the changes in consumer behavior we have discussed are dictating a significant shift in what makes marketing effective. The ability to shop anywhere at any time, gather information about products and services and promote the social conversation means that across the board—whether you're a consumer, citizen or business customer—you can have an impact on any brand you wish.

Marketers need to be able to identify the solutions that can help them adapt to this change. However, marketing departments often end up fragmented by the technologies they employ to support their customer experience. Marketers use different tools to build different campaigns and programs across different aspects of the customer lifecycle. In fact, large companies have an average of 12-15 marketing tools. And they're typically all disconnected. This creates a lot of inefficiencies inside the marketing organization, and perhaps more concerning, a disconnected and fragmented customer experience. How can your brand promise match your customer experience in this scenario?

With Microsoft Dynamics Marketing, our focus is to enable marketers of all types to create **amazing customer experiences** by enabling them to **engage customers**, **build pipeline** and **demonstrate impact**.

Drag and drop visual Campaign Designer

Drive customer engagement with effective campaigns. An intuitive visual designer makes it easy for marketers to create multi-channel campaigns integrated with email marketing and social channels so you can generate highly qualified leads.

Lead lifecycle management

Build your sales pipeline with qualified leads using a solution designed to manage the process of lead acquisition, scoring, distribution, and segmentation across marketing and sales.

Easily import leads to nurture and measure consistently for better results.

Multi-dimensional scoring allows Marketers to create precise scoring models across multiple elements (e.g. engagement, demographics, behavioral data, etc.)

Leads generated last week may or may not be as hot as the Leads generated this week. Recency/frequency based scoring helps Marketers identify the best Leads by changing the scoring based on recency or frequency of engagement.
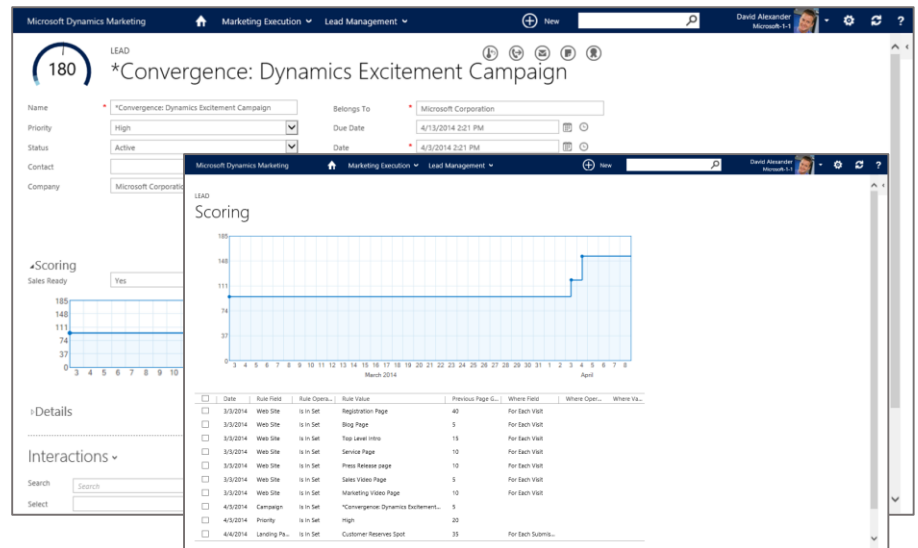
Lead performance reporting based on campaign performance and conversion in order to optimize campaign results.

Homepage

Marketers can easily configure a personalized view of their key performance indicators and reports such as leads generated, email effectiveness, landing page opens, and budget performance.
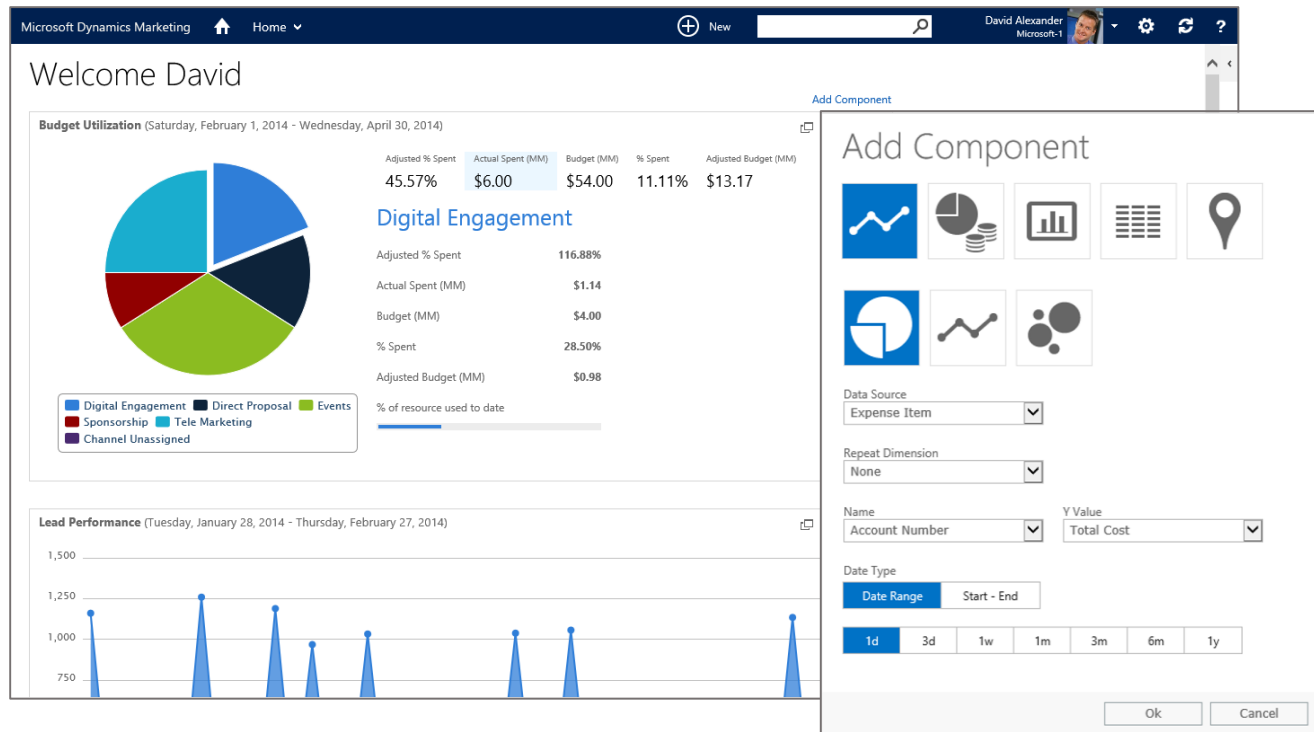
An easy to use graphical editor allows Marketers to tailor their homepage for their role – view Marketing data graphically in Charts (pie, area, bubble) or in a traditional list view, or aggregate multiple data sources for an end to end view of campaign performance using Power BI.

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Scalable Email Marketing

Send highly personalized E-mail messages to drive improved open rates. Personalize the content per sender, recipient, subject & content allowing you to send fewer emails with greater business results.

- Open APIs to support emails triggered by third parties applications tracking results within Dynamics Marketing

- Deliver mass and transactional emails scalable to millions of emails to customers per day

- Cross campaign rules to prevent email fatigue. Manage and control how many emails a contact can receive in a given time period to improve email performance.
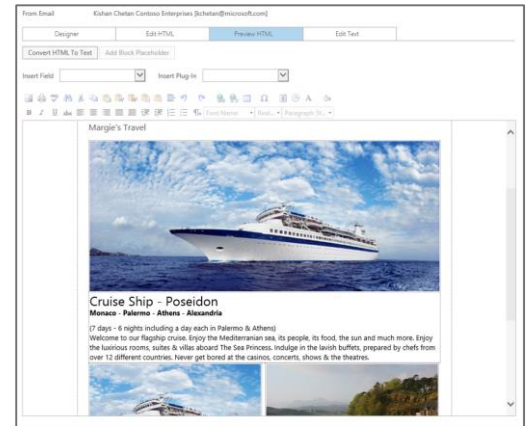
Power BI for Marketing

Visually analyze your data using predefined Power BI reports focusing on financials, lead performance, asset management and email deliverability.

Obtain a 360 degree view of the Customer by visualizing contact demographics, online behavior, marketing lists and much more using Excel based reporting tools integrating key Marketing and Sales data.

Demonstrate the impact of your Marketing investments with robust Campaign ROI reporting. Power BI can access your marketing spend and revenue to calculate the return on your marketing investment, or ROMI.
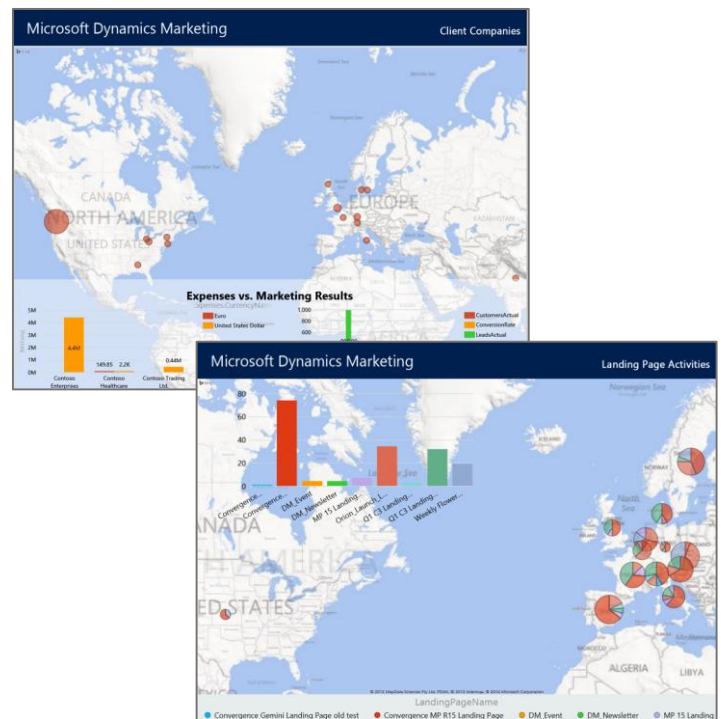
Improved Sales & Marketing Connector

The Dynamics Marketing Connector is new and improved, with easy configuration and a UI for data mapping. Users can configure data mapping to bring in important information on the contact and lead to assist in better lead scoring. Sales gets better quality leads as a result. Rich information means that reporting on lead pipeline and lead conversion is easily accessible in reports.

Office 365 Procurement

Easily try and buy Microsoft Dynamics Marketing through Microsoft Office 365 providing single sign in across all your Office 365 services.

Sales

In order to help sellers sell more effectively by selling more, winning faster and driving results, we are pleased to deliver the following features:

CRM tablet app enhancements

Microsoft Dynamics CRM for tablets helps you stay connected and productive wherever you are. Use your Windows 8, iPad or Android tablets to stay up to date with your customer info—even when you're on the go. Arrive prepared for every appointment, and update your notes, tasks, contacts, accounts, and leads while the details are still fresh in your mind. Data is cached for offline viewing so you can still access key data if connectivity is lost.
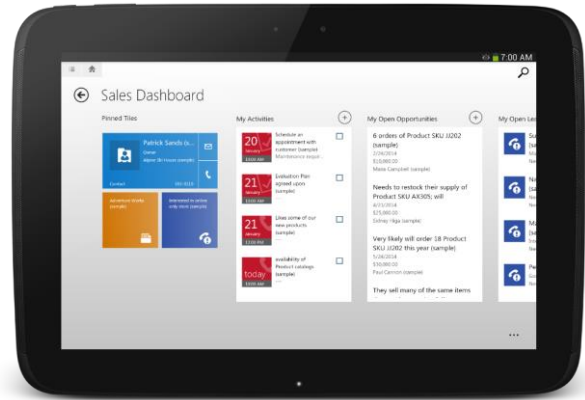
Insights[1]

Insights puts real-time company and contact information from 30,000 sources into Microsoft Dynamics CRM, helping marketing, sales and account management professionals engage more effectively with prospects to win more deals as a result of less time spent researching and more time selling.

Data
- Millions of company and contact profiles from around the world
- Email addresses and phone numbers
- One-click data sync into CRM
- Financials, SEC filings, family trees, and industry profiles

Insights
- Breaking news (e.g. funding news, company expansion, leadership changes)
- Social buzz for target companies (blogs, Facebook, Twitter)
- Social profiles for decision makers (LinkedIn, Facebook, Twitter)

Connections
- Warm introductions through personal and corporate connections
- Aggregate personal connections from Outlook, LinkedIn, and Facebook
- Connection sharing (access all co-workers' connections privately and securely)

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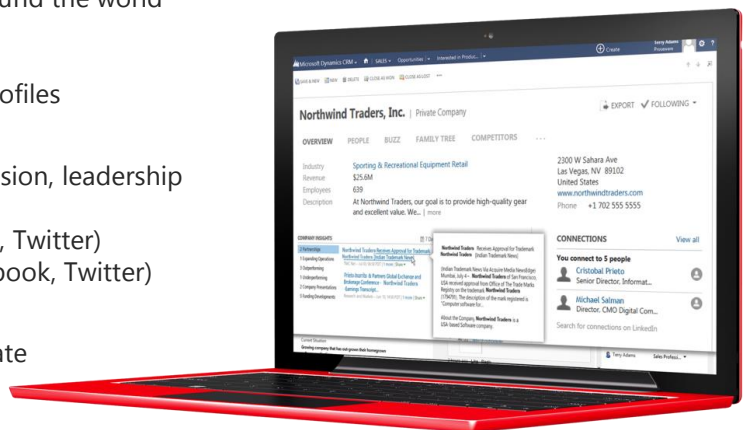
[1] Insights is available through a strategic partnership with InsideView at no additional cost to Microsoft Dynamics CRM Online customers with Professional licenses in the United States, with broader global rollout coming later in 2014.

Customer Service

Social and mobile have forever changed customer expectations of how they interact with companies for service. 86% of customers are willing to pay more for a better customer experience. They expect high quality, consistent service on the channel of their choice, whether it is over the web, social networks, or on the phone. Today, 67% of consumers use web self-service to find answers to their questions. The challenge for customer service organizations is to balance delivering amazing customer experiences against their cost to service for an optimal mix over time. Cost of service varies significantly across channels, so companies are investigating how to provide differentiated levels of customer support, while looking at how to empower their agents and make them more efficient and effective.

Microsoft Dynamics CRM enables companies to **earn customers for life** by providing **relevant**, **responsive** and **personalized service**. Companies can connect their customers with the right answers to their service inquiries at the right time, via their channel of choice across web, social, chat, mobile and phone. Agents are empowered with a single, unified experience to deliver amazing customer experience with cross-channel context.

Unified Service Desk

A powerful desktop designed to improve key business metrics such as Average Handling Time, First Call Resolution and Customer Satisfaction by providing agents a unified experience to access all of the tasks and applications across diverse environments required to complete customer interaction processes via any channel. Handle voice, chat, email in a unified experience, automate repetitive tasks using contextual interaction data (e.g. launching applications, performing searches, data entry) and handle multiple customer sessions simultaneously. Customers can easily create agent desktop applications through a configurable interface within Microsoft Dynamics CRM.

Manage multiple customer sessions simultaneously

Supports multiple applications per session

Call Scripting increases agent efficiency and consistency

Enterprise Case Management

Deliver world-class case resolution by automating case creation and routing rules, creating failure and warning actions that execute if your Service Level Agreements are not met on time. Ensure you exceed your customers expectations by easily:

- defining and managing service entitlements and SLA's
- creating dynamic routing and queuing rules to ensure you hit your service targets

Define and customize enterprise-wide KPI's (e.g. first response, resolution by, customer sat) and associate processes and rules (e.g. routing, queuing, escalation and notification) to ensure they are met.

Note: The following Enterprise Case Management features are Opt-In. To Opt-In: go to Settings > Administration and then click Install Product Updates. Installing optional product updates is a one-way process. Once enabled, the features can't be disabled.

Case form

With the updated case form, you can now view merged cases, view or add child cases, review entitlements , and even add a Timer to ensure you do not exceed/breach your SLA's. The timer control can be set-up to show a running counter displaying remaining time by when SLA KPIs need to be met.

Entitlements

Service organizations need to keep track of how much support to provide to all their customers, including the type of support. Now you can create entitlements, which are like contracts that let your service reps know how much support to provide, when a customer has a support request.

Service Level Agreements

Provide excellent service to your customers by using Service Level Agreements (SLA) that track the level of service a customer receives. Create an SLA to track when a customer will receive a response on a support case, how long it takes to close a case, and what happens if the case isn't closed on time. When you create an SLA, it's important to also let your service reps know how much time they have to answer and resolve a case. A new Timer control can be added to the case form to show how much time a rep has to perform tasks such as initiate first response or to resolve a case.
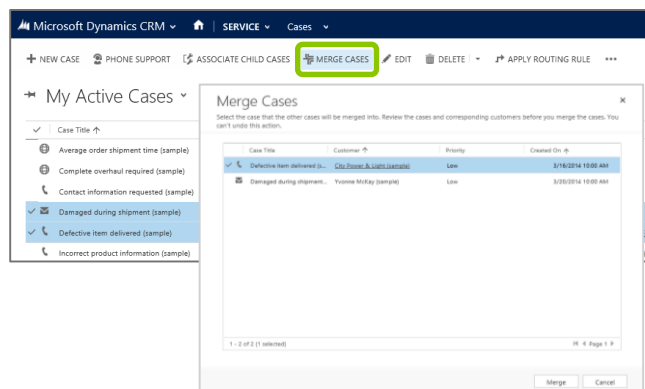

Timer on case form, shows the remaining time to resolve the case.

When the SLA has expired.

Merge Cases

Eliminate redundancies between similar cases by merging them into one case. When a case is merged all of the open case activities, notes, and attachments of the constituent cases will be reparented to the primary case.


Parent / Child Cases

When there is a case where work needs to be done by multiple teams or when one issue effects multiple customers–- now a customer service rep can open a primary case, called the parent case, and then create a secondary case, called the child case.
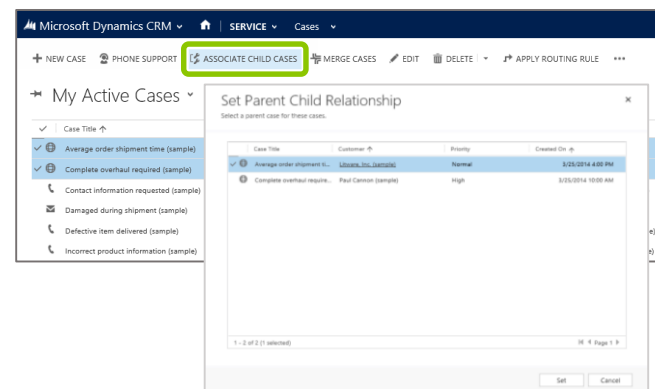
Define Status Reasons

Status reason transitions are an optional additional level of filtering to define what the status reason value can be changed to for each status reason. Defining a limited list of valid options can make it easier for people to choose the correct next status reason for a record when you have a large number of combinations for valid status reason values.
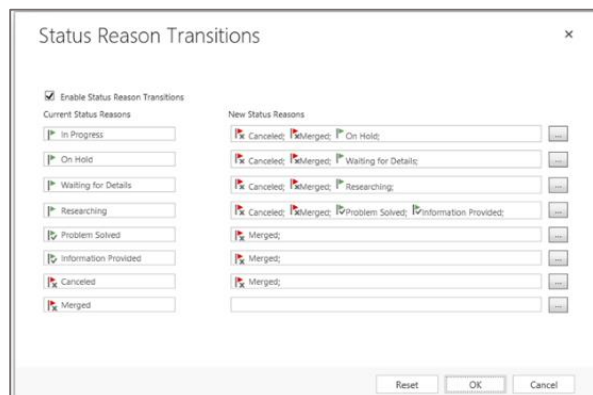

Automatic Case Creation

When someone sends an email to your support email address, the automatic case create rule converts the email in to a support case. The same happens if someone is talking about your product or service on social media, the issue is captured and converted into a support case.

Social Care

Find out what your customers and others are saying about your product or service on Facebook and Twitter, and resolve emerging issues before they escalate. Download, optimize and quickly start using the new Social Care Sample application to extend your customer service on social channels. Companies who have their owns means of social listening can also customize and extend Social Care Application to create cases, contacts and social profiles from the social posts they are monitoring.

Service Management

Easily manage the configuration of the your Customer Service capabilities.
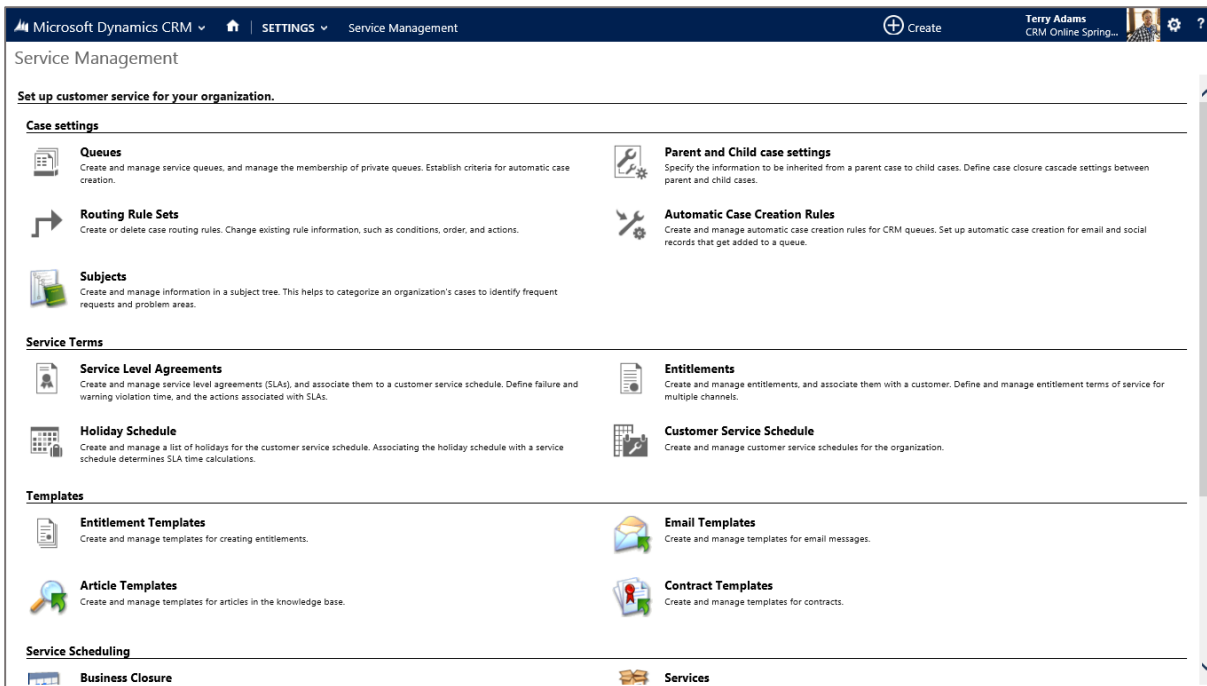
CRM tablet app – Case Management

Continue to deliver amazing customer experiences even when you are away from the office. The CRM for tablets app has been extended to include Customer Service capabilities optimized for people who are always on the move but want to keep an eye on high priority Cases, monitor Queues or route items across the queues to deliver amazing experiences no matter where they are.
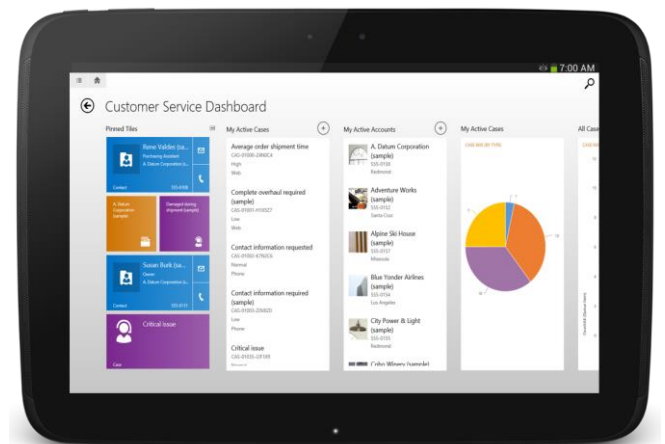
Multi-channel Care

Customers are more connected and better informed than ever before. Organizations are looking for business solutions that can strengthen their ability to connect with customers on their own terms, using whatever device and whatever channel they prefer. Parature offers one of the best cloud-based solutions for customer self-service.

Parature Portal: a 24/7 customer support center that is seamlessly integrated into your organization's current website. This web-based help center gives your customers easy and convenient access to an intuitive, searchable knowledge base which delivers quick answers to their most-commonly asked service and support questions. If your customers still require personal support after using the knowledge base, they can submit a help ticket, track its progress at their convenience and receive an automatic notification email when an answer is available for them.
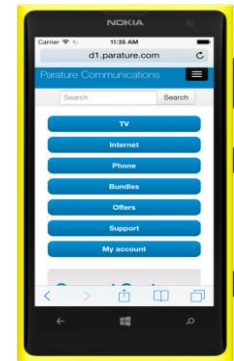
Parature Mobile Self-Service: Allow your customers to access answers to frequently asked questions using whatever device they prefer. The responsive design of Parature Portal enables you to increase the reach of your knowledge management efforts and provide consistent and personalized experiences across desktop and mobile devices.

Parature Facebook Portal: provide businesses and organizations with a 24/7 multi-service channel for customer support on Facebook. Customers and consumers can browse FAQs and updates, or submit a help desk tickets. In addition, you can integrate Parature Live Chat seamlessly to deflect customer complaints and service issue posts on your brand's Facebook page.
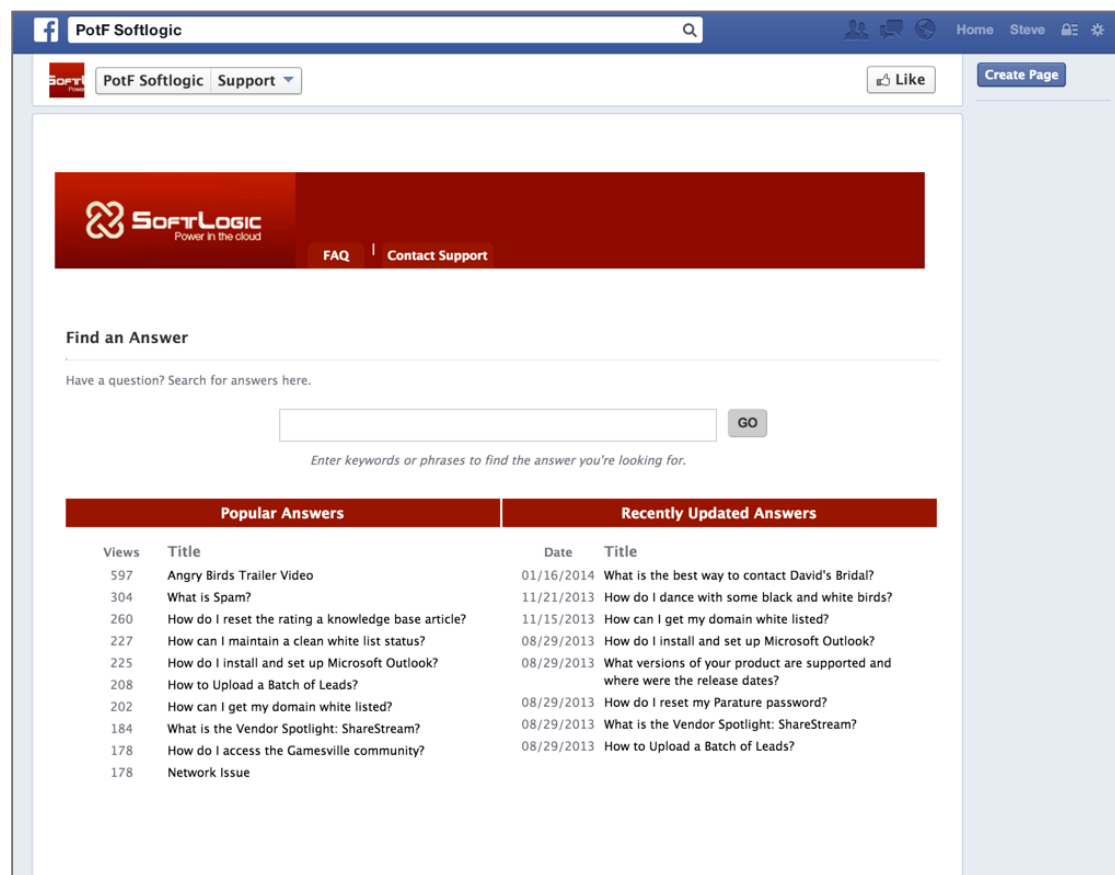
Parature Real-time Chat: provide your customers with instant and personalized online support with Parature Chat. Empowers your organization with an immediate, seamless transition from a self-service to assisted channel at critical times during the support interaction. Comprehensive rules for escalation, deflection and prioritization ensure a timely response and that Service Level Agreements (SLAs) are met.
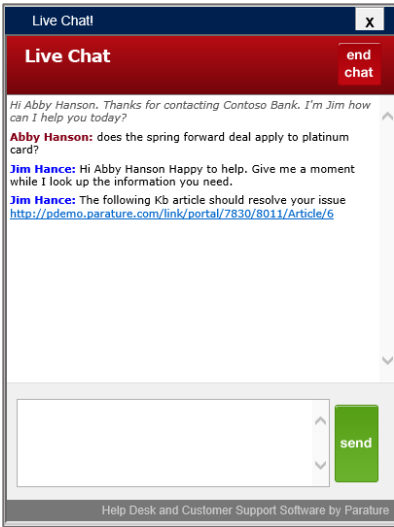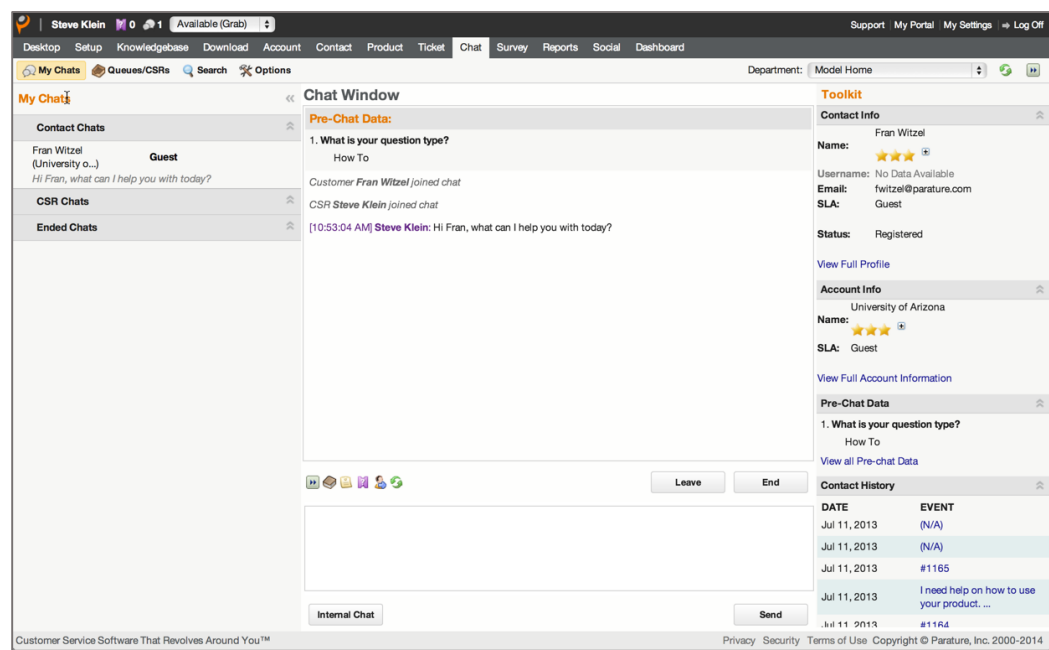
Knowledge Management

Parature Knowledgebase: an intuitive customer self-service solution that provides quick answers to common questions and support issues, plus essential downloads including forms, how-to videos, product manuals, knowledge base information updates and more. Easily add and update information and customize its order and placement to put the most-viewed information in a prominent place.
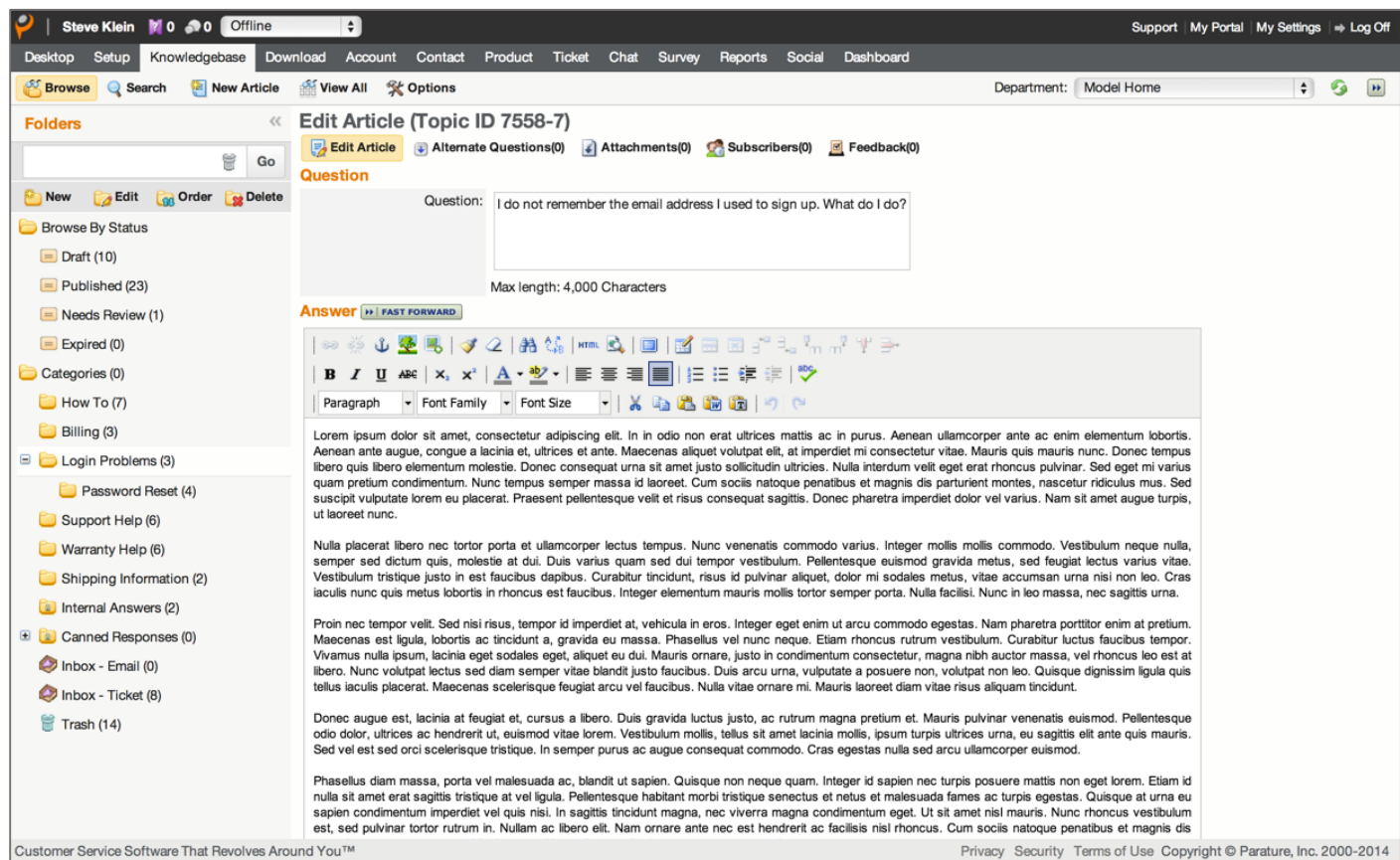
Social

Social has changed the way people engage and communicate. Today's customers are more informed and getting their information in new ways and from new sources. Decisions are influenced by discussions online and user reviews. In fact, 75% of B2B customers are likely to use social media to influence their purchase decisions, and customers are over 70%[2] of the way through the sales cycle before they contact you. Most of today's social listening tools, however, are so complex and expensive that they're only available to an elite few – which means relevant information rarely gets to the front lines who need it. At Microsoft, we believe this valuable information should be available to everyone.

Microsoft Social Listening

Microsoft Social Listening is a powerful new service that your organization can use to monitor social media channels like Twitter and Facebook. Use Microsoft Social Listening to track products, brands, competitors, and campaigns globally and in real time to gain a true understanding of your customers and your business across the social web.
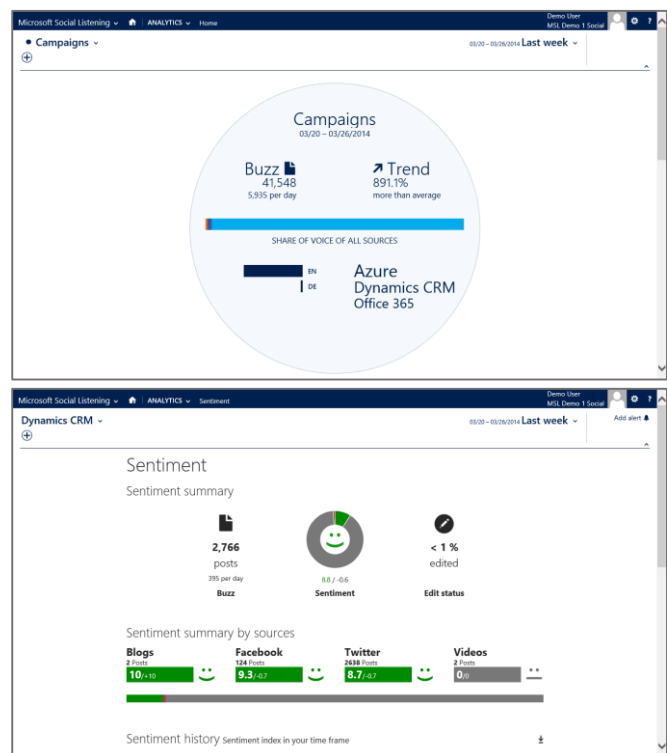
Listen & Analyze

Global sentiment analysis: Gain a true understanding of your customers and your business on a global scale across the social web. Native language sentiment analysis means you won't miss cultural cues.

Share of voice: Track your brand, products, and influencers in 28 languages across Twitter, Facebook, YouTube, news channels, blogs, and forums.

Competitive intelligence: See how you stack up against the competition.

Campaign management: Measure social impact on marketing, sales, and service campaigns. Gain insight into what's working and what isn't.

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[2] http://partnersinexcellenceblog.com/70-of-buying-process-completed-without-sales-invovlement/

Monitor & Respond

Top influencers: Identify and connect with the most influential voices in your community.

Early warning system: Gain early insight on problematic issues; stay on top of hot topics.

Post alerts: Notifications on custom key words, competitive conversations, industry info.

Trend alerts: Get notified when posts and publications differ from statistical expectations.
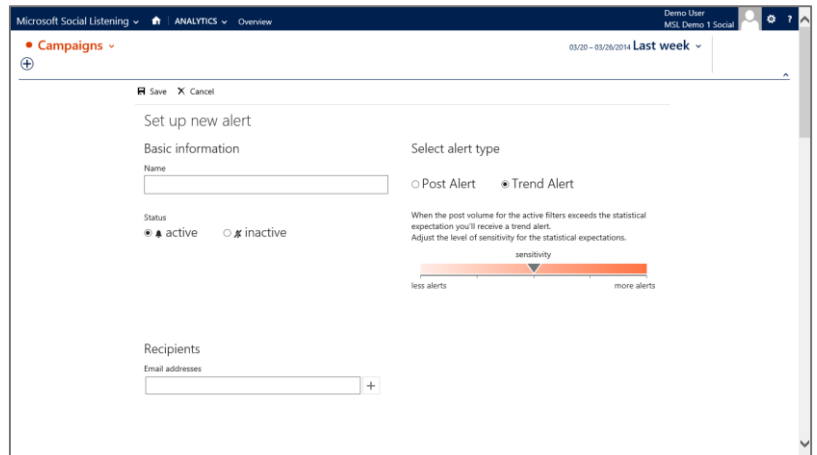

Social Insights in Microsoft Dynamics CRM

Bring the benefits of social listening to your Microsoft Dynamics CRM Online experience with Social Insights. Microsoft Social Listening visuals can be added your CRM dashboards and forms. These Social Insights charts and graphs help you identify buzz, trends and sentiment related to things like your customers, campaigns and competitors.

A Social Dashboard within Microsoft Dynamics CRM presents a global view of the Social Insights that are most relevant for your role.

Contextually displaying Social Insights within a Microsoft Dynamics CRM record helps sellers stay on top of their customers' social conversations.
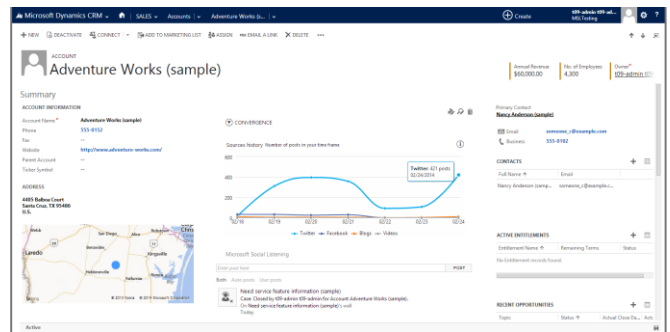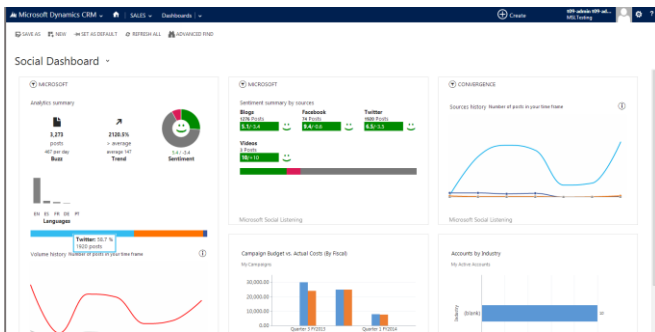
Platform

Powerful tools allow you to tailor Microsoft Dynamics CRM to meet your unique business requirements. Microsoft Dynamics CRM facilitates the delivery of rapid business value with an agile solution framework that can be easily tailored and configured. The Microsoft Dynamics CRM platform provides a declarative paradigm that ranges from defining the data model to providing integrated persistence, security, API access, user experience and programming paradigms based on a modern open architecture. This release will introduce several new investments in our platform capabilities to further our commitment to an open, customizable and extensible online service.

Server-side Synchronization

Stay productive and up to date no matter where you are or what device you're on. With server-side synchronization, administrators can easily manage the synchronization of email, tasks, appointments and contacts between CRM and Exchange.

Originally introduced in the Dynamics CRM 2013 / Fall '13 Release to synchronize emails, tasks, appointments and contacts between Dynamics CRM and Microsoft Exchange on-premises deployments. The server-side synchronization capabilities have been enabled as a cloud service to configure and manage the synchronization of Email, tasks, appointments and contacts between Dynamics CRM Online and Microsoft Exchange Online. POP3/SMTP[3] providers are also supported for sending and synchronization of Email.
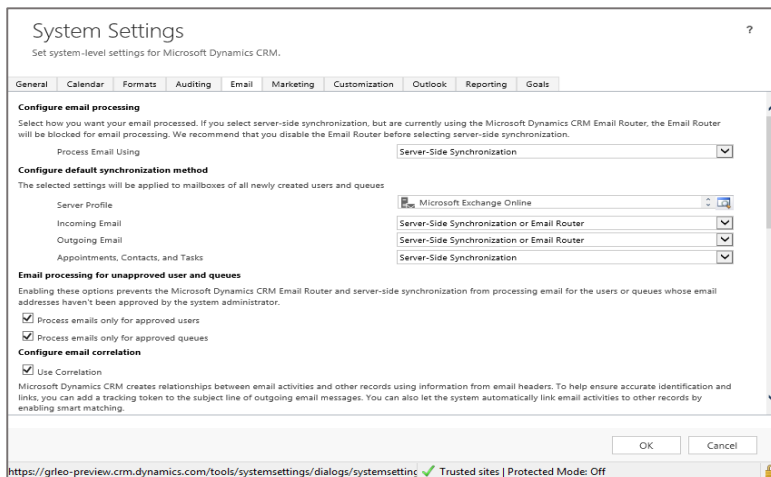

Synchronization using the Email Router and Outlook client will continue to be supported.

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[3] Supported POP3/SMTP providers include: Gmail, Yahoo

SharePoint Integration Enhancements

Simplified integration between CRM Online and SharePoint Online managed within Microsoft Dynamics CRM Online. Customers of Dynamics CRM Online and SharePoint Online will no longer need to install and configure the CRM List Component to enable the Document Management integration. An Alert is shown in CRM notifying CRM Administrators when Server-based SharePoint Integration is not enabled (similar to Outlook Client install notification).
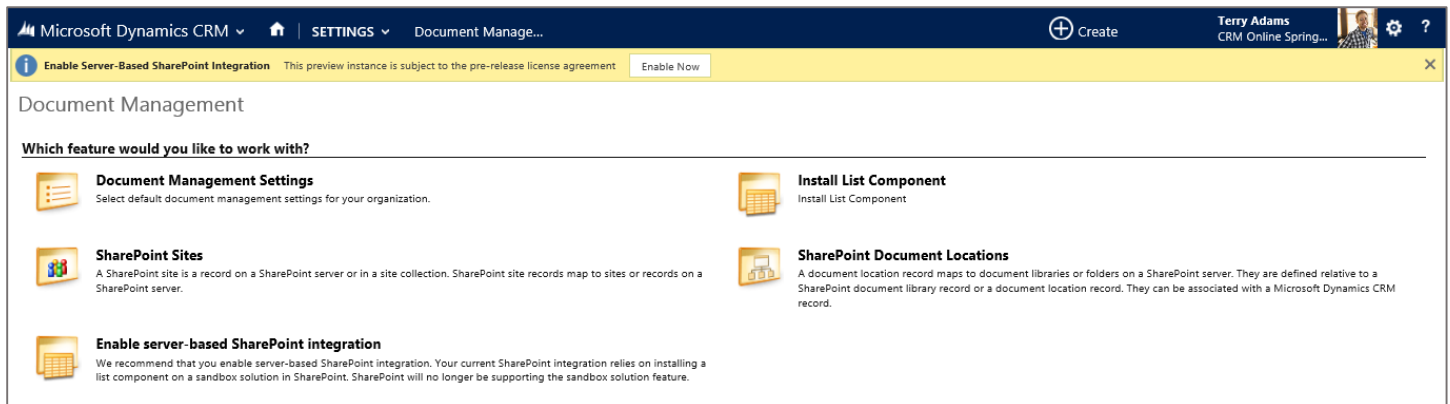
Sandbox Environments

Develop and test customizations in an isolated, non-production online environment. Administrators can copy a CRM Online instance into a Sandbox Instance.

- Minimal Copy only includes customizations & schema from source. Scenarios include: Iterative Team Development, Partner/ISV Solutions, Proof of Concepts
- Full Copy includes all application data, users, and customizations from source. Scenarios include : User Acceptance Testing, Upgrade Testing, Preview in Production (TAP/EA), Training

Administrators can **reset** a Sandbox Instance back to factory settings (e.g. delete and re-provision)

- Can only reset sandbox instances – not production instances.
- Select a target version from any Microsoft Dynamics CRM services running in production.
- Resetting, deletes and re-provisions an instance.

Administrators can take/restore a **snapshot** of a Sandbox Instance.

- Take / restore a snapshot of any sandbox instance. (only one snapshot per instance at any time)

New CRM Online Admin Center

Administrators can easily manage their test and production Dynamics CRM Online environments. The New CRM Online Admin Center provides a single interface for CRM Administrators to manage:

- license related items such as storage and instances (production or sandbox)
- solution lifecycle management

Platform Investments

Enhanced platform capabilities enabling organizations to build, test and configure CRM deployments of all sizes.

Solution Framework: Export-As Capability that provide the means to export a solution and target at a specific feature release of CRM lower than the current release of CRM.

Tooling:

- CRM Package Deployment Tool
- CRM Configuration Migration Tool
- Updated Plugin Registration Tool
- Visual Studio Toolkit enhancements
- More PowerShell Support
- New Windows Client API (Microsoft.Xrm.Tooling.xxxx)

Extensibility:

- OAuth discovery specification to support ISV/office clients
- GROUP AND/OR for workflows

Scale: Scaling Improvements in Async processing to handle very large workloads.

Compatibility

Continuing our commitment to deliver CRM functionality on the latest technologies we have introduced support for the following:

- Windows 8.1
- Internet Explorer 11
- iOS7 Safari on iPad (web application)
- iPad Air using Safari (web application)
- Windows Server 2012 R2 (CRM server)
- iPad Air using CRM for Tablets

The Microsoft Dynamics CRM Compatability List provides an up to date view of recent and upcoming compatability testing results.

Conclusion

Microsoft has a powerful vision to create a family of devices and services for individuals and businesses that unites and empowers people at home, at work and on the go, for the activities they value most. Microsoft Dynamics CRM 2013 plays an important and unique role in this strategy. As the world grows smaller and more complicated, technology plays an important role enabling a business to connect with their customers. Microsoft Dynamics CRM energizes and empowers these connections with real time information and collaboration, ultimately enabling them to deliver amazing customer experiences.

It is truly an exciting time to be engaging with Microsoft Dynamics CRM! Microsoft looks forward to keeping you informed of the innovations and exciting capabilities that Microsoft Dynamics CRM will deliver for you now and into the future!

The Microsoft Dynamics CRM Team

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

U.S. and Canada Toll-Free 1-888-477-7989
Worldwide +1-701-281-6500
www.microsoft.com/dynamics

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